TECHNICAL RESOURCE

20

IN MORE DETAIL

Alberta
MUNICIPAL AFFAIRS

TABLE OF CONTENTS

	Page
PURPOSE	1
PART ONE – PROCESS	
CHAPTER 1 – Step One – Reviewing a Municipal Profile	5
Purpose	
A. Gathering Descriptive Data	5
B. Data for a Municipal Profile	6
C. Identifying Community Issues	7
D. Analysis of Issues	8
CHAPTER 2 – Step Two – Building a Preferred Future	9
Purpose	
A. Comparison of the Two Recommended Approaches	9
B. The Preferred Future – Single Scenario Approach	10
C. Using the Creative Visioning Approach	11
CHAPTER 3 – Step Three – Developing a Municipal Trend Scenario Future Trends and Realistic Constraints	15
Purpose	
A. Setting Scenario Parameters	15
B. Organizing Trend Information	16
C. The Single Scenario Approach	16
D. Presenting the Scenario	17
E. Analyzing the Scenario	18
F. The Multiple Scenario Option	18
CHAPTER 4 – Step Four – Vision and Action	21
Purpose	
A. Writing A Vision Statement	21
B. Translating Vision Into Action	22
C. Setting Goals for the Future	23
D. Priorizing Community Actions	23
E. Involving Community Stakeholders	24
F. Identifying Future Actions	25
G. Follow Up	25
CHAPTER 5 – Cross–Impact Matrix Analysis	27

Page

PART TWO – MUNICIPAL VISIONING

CHAPTER 6 – From Forecasting to Futures Planning 35

A. Introduction 35
B. Forecasting in an Uncertain World 35
C. Futures Planning and the Private Sector 36
D. Futures Planning and the Public Sector 37

CHAPTER 7 – The Visioning Process in Action 41

Willamette Valley Choices for the Future 41
Alternatives for Washington 42
The Colorado Front Range Project 44
Tri-County Tomorrow (Peoria, Illinois) 46
Yukon 2000 49
Passport to the Future (County of Vulcan, Alberta) 50

APPENDICES

Appendix 1 – Bibliography 53
Appendix 2 – Ground Rules for Scenario Writing 59
Appendix 3 – Examples of Vision Statements Prepared in North America
State of Nebraska 63
State of Oregon 68
City of Aurora, Colorado 71
Front Range Counties of Colorado 73
Yukon Territory 77

PURPOSE

This resource is intended to be used by participants who are interested in contributing more time and effort to the preparation of a Vision Statement and Action than is required by the Discussion Guide.

How much time is needed to follow the suggestions in this resource paper? That is for you to decide. There are many references to places where more effort and time will yield more reliable results than can be obtained through the Discussion Guide alone. The users can choose for themselves where they wish to be more thorough.

The layout of this Technical Resource follows the layout of the Discussion Guide with four sections: Reviewing a Municipal Profile; Building a 'Preferred' Future; Exploring the Future Trends and Realistic Constraints; and, Vision and Action.

Designing a municipal futures program is a challenging task. Fortunately a vast body of information on how a local government or community can address such a challenge is available. The final results are representative of a process unlike that of any other government or community activity. It is a first-time experience for Alberta and a one time opportunity for its municipalities.

For those municipalities choosing to participate in VISION 2020, at whatever level of intensity, the end results will be a municipal vision designed to serve and guide the local municipality and the community as it prepares to move into the next century.

If some or all of the techniques described in this resource are used, the end products will be very similar to those that would result if only the Discussion Guide were used. However they will have been developed with greater depth and reliability. Those municipalities that use the results — particularly their municipal decision-makers — will be able to have more confidence in the products and in their use as a guide to the future. Similarly, if some of the public participation models are used, the resultant Vision Statement would have broader acceptance.

PART ONE

PROCESS

CHAPTER 1
STEP ONE – REVIEWING A MUNICIPAL PROFILE

PURPOSE

The municipal profile establishes a starting point from which the more exploratory visioning exercises will flow.

A municipal profile does not have to be a complex catalogue, but should be a condensation of descriptive data and other information that says something important about the community as it exists today.

A. Gathering Descriptive Data

The first task in building a municipal profile is to gather and summarize basic descriptive data. This is an inventory of information that helps describe the local community. Ideally, such information should cover the local geographic setting, climate, natural resource base, transportation system, major community institutions, and social and cultural resources, as well as any other important indicators that are deemed relevant to the local community (see Data for A Municipal Profile overleaf).

The specific information for describing local municipalities will vary considerably from one jurisdiction to the next. For some municipalities — particularly smaller or more geographically–remote jurisdictions — some of the suggested categories of data or specific indicators will not apply. For example, a local community may not have an institution of advanced education, or it may not be served by a railroad or airline. For other municipalities — particularly larger and more developed jurisdictions — additional categories of descriptive data may be necessary in order to adequately describe the community.

In some instances, the definition of relevant information will necessarily extend beyond a municipality's precise boundaries. For example, a major employer of a municipality's labour force might be located in a neighbouring political juristiction, or critical health care may be provided by a medical institution that serves an entire region. Logically, such data might be included in the local municipal profile.

Locating data for suggested categories and indicators should not be difficult. Most data will be available through existing municipal government sources, other

community institutions such as boards and commissions, chamber of commerce, or regional or provincial government sources. Indeed, for many municipalities there will undoubtedly be an excess of descriptive information to be reviewed.

B. Data for a Municipal Profile

The following list suggests basic categories of data and some of the specific indicators that might be included in a municipal profile.

Geographic Setting:
- general description
- area size
- topography
- drainages
- major geographic features
- distance to other major centres

Climate:
- general description
- average precipitation
- average temperatures
- frost free days
- wind

Natural Resource Base:
- general description
- water resources
- arable land resources
- mineral resources
- energy resources
- forest resources
- wildlife resources

Transportation Infrastructure:
- general description
- major highways
- railroad freight lines
- railroad passenger lines
- airports and airlines

Local Economy:
- general description
- recent history
- labour force size and participation
- major employment sectors
- major employers
- new employment sectors

Demographics:
- general description
- recent history
- population
- age/sex distribution
- income distribution

- educational levels
- household size
- ethnic influences

Political Institutions:
- general description
- municipal government structure
- appointed bodies
- other local political jurisdictions

Community Institutions:
- general description
- schools
- advanced education
- health care
- religious
- service
- community associations/leagues

Social and Cultural Resources:
- general description
- cultural
- sport
- recreational

Other descriptive data:
- important historical facts
- unique features and attractions
- major community events
- Technical reports and statutory planning documents

It is important that the data be collected on a selective basis and relate to the lifestyle and characteristics of the community in terms of its past, present and future desirability as a place to live. It is recommended that the data not be collected on a 'shotgun' approach.

C. Identifying Community Issues

Identifying current community issues moves into the realm of more subjective analysis. This task requires listing major issues currently occupying the municipality that are perceived to affect the future of the community. Agreeing upon these issues may involve some discussion among process participants. Actual identification might include an appropriate name for the issue, the specific problems or challenges it poses, a brief description of its relevance to the community's future, and the major agencies or institutions involved in addressing it.

For some municipalities, the municipal needs assessments organized by the Department of Municipal Affairs, Planning Branch, Planning Services Division, over the last several years may provide an initial source of information in identifying

current community issues. This process requires a participating municipality to list current, locally perceived "needs" and then rank them in order of priority.

Needs Areas Identified in Needs Assessment Studies

The individual needs identified by 35 Alberta communities have been clustered under the following headings:

1. Communications and Public Relations
2. Co-operation
3. Image
4. Assets (Self-awareness)
5. Self-reliance
6. Economic Development
7. Education
8. Jobs
9. Environmental Protection
10. Finance
11. Entrepreneurs
12. Local Government
13. Planning and Development
14. More People
15. Provincial/Federal Government
16. Public Development (Works)
17. Public Involvement
18. Recreation and Tourism
19. Residential Development
20. Rural Development
21. Security
22. Health and Other Services

D. Analysis of Issues

There are many ways of analyzing the issues to determine which are the most important over the long term. The use of cross-impact matrix analysis is one possibility and is explained in more detail in Chapter 5.

CHAPTER 2
STEP TWO – BUILDING A PREFERRED FUTURE

PURPOSE

The second step in the VISION 2020 process is the heart of the activity — creating a Preferred Future Statement which is simply an agreed upon image of what the community would ideally be like. This corresponds to the second step of the Discussion Guide, and the question "where do we wish to go".

Two alternative approaches for creating a preferred future statement are provided here: the first is an elaboration of the basic procedure used in the Discussion Guide; the second is more open–ended and incorporates a mix of visioning techniques, such as guided imagery, visualization, and consensus building. These two approaches may be used separately, in two concurrent processes, or, ideally, in combination with one another.

It should be emphasized that in the step 'Building a Preferred Future', the appropriate technique to use and the level of detail desired are the choice of each council. Some municipalities may wish to direct their staff to prepare various scenarios to assist council's discussion of a 'Preferred Future'. Such scenarios may be developed so they can be used to obtain public input at meetings and forums prior to consideration in Step 2 of the Discussion Guide.

A. Comparison of the Two Recommended Approaches

The two approaches are very different. The preferred future scenario approach is an elaboration of the Discussion Guide procedure. It is a more logical, analytical, "left–brain" approach that relies on a task–oriented process in constructing a preferred future statement. For a 'left brain' approach of an analytical kind, see the description of cross–impact matrix analysis, Chapter 5. The Creative Visioning approach represents an entirely new group process. It is a more conceptual, intuitive, "right–brain" approach that first creates the image of a preferred future and then works back to build a consensus around written and visual descriptions.

Both approaches have their strengths and weaknesses. Conceivably, combining them may offer the best of both worlds. However, participants should be warned that

there have been occasions when group tensions have developed and no products have resulted from the creative visioning approach.

B. The Preferred Future – Single Scenario Approach

The following prescription is designed for use by the participants who wish to explore the value base of their community in a more thorough way than is permitted by the question and answer format of the Discussion Guide.

The logical starting points for developing a preferred future statement are the prevailing community values already stated in the municipal profile. In reviewing these values participants should be able to develop a set of assumptions that reflect the communities best and highest beliefs for the future. The Single Scenario approach can be used where professional resource support are limited or unavailable.

The basic Discussion Guide material can be elaborated by a further series of steps:

1. Build upon the questions in the following categories:
   - Describe your ideal municipal government.
   - What are its major roles and functional responsibilities?
   - What services does it provide to local constituents?
   - What is its relationship to provincial government and the Department of Municipal Affairs?
   - What is its optimal land use (substitute: budgeting, decision–making, citizen involvement, etc.) process?
   - Describe your ideal local community.
   - What aspect of the community's heritage and traditions should be preserved for the future?
   - What aspects of the community's economic base should be supported and strengthened?
   - What aspects of living and working in this community should be protected at all costs?

2. Employ a group sharing format where participants present their individual responses to these questions. Clarification of individual comments is encouraged, but detailed discussion or debate is minimized — at least until all the reports have been presented.

3. Use a consensus-building exercise to develop common ideals. The group will identify shared areas of concern and ideals that have emerged from individual reports. These are recorded on large flip charts and adapted as necessary in order to meet with the approval of all participants. Ideals that meet the approval of the entire group become part of the common "value base." Ideals that are not universally accepted — or which cannot be adapted to meet the entire group's approval — are dropped from further consideration.

4. Assist participants in developing value statements that reflect the group's shared ideals. Many approaches can be used here. The recommended approach identifies the essential ideal and develops an accompanying value statement.

C. Using the Creative Visioning Approach

The use of these techniques requires the guidance and support of your facilitators and a professional resource team is strongly recommended to provide direction and support. The extensive use of creative visioning is not recommended as a core activity since it involves at least one thing that is generally in short supply – lots of time.

The techniques might be of value for special interest groups, cultural and community groups, students in colleges or similar public participants. The results are sometimes enormously valuable but sometimes fail to justify the time and effort invested in their development.

A series of visioning techniques may be used including guided imagery, brainstorming, visualization and consensus building. One relatively simple technique is to take a brief look at the past, the present and the future, using a special visual trigger which may take the form of a document or video material. Such a review may help you get into the right frame of mind.

A more advanced approach depends upon the creation of a blank slate in the minds of participants on which they are encouraged to envision and articulate their own images of a preferred future. First, inner images are created, then translated into written and visual images, and finally, developed into a consensus vision. The result is a much more qualitative vision of the future based on the shared convictions of the participants.

For some groups, this approach will represent a more challenging assignment than using the Discussion Guide, Step 2. For others, it will offer a stimulating and refreshing change in the process. The sequence of visioning tasks presented below is a generalized activity construct; specific activities may vary according to the setting, needs of the participants, and style of the persons facilitating the process. In addition, this sequence represents just one of many possible combinations of visioning techniques.

The first task in the advanced creative visioning approach involves the use of guided imagery. Guided by an expert facilitator, participants are asked to place themselves in a comfortable and relaxed state of mind. Closing their eyes, they are encouraged to separate themselves from the concerns of the present — the demands of their offices, important issues they are dealing with, unfinished business — and so on.

In this relaxed state, participants are next guided to invoke mental images of their community at some point in the future. For example, they are encouraged to place themselves in a number of familiar settings — on Main Street, in a local neighbourhood, at a public gathering place, at a local shopping centre, in municipal council chambers etc. Cues are given to help them create a tangible sense of place — sights, sounds, etc. Then, prompted by a series of questions, participants "image" their ideal community of the future: what it looks like, how it has changed, what people are doing, etc. They are asked to notice details, particular items of interest, new features and attractions. Gradually, they are brought back to the present where they are encouraged to quietly record their images of this ideal future community.

The next task brings participants, their images and notes on the future community back into the group setting. Here, they share their individual impressions of the ideal future community — what it looks like, how it has changed, etc. Impressions are recorded on large flip charts for everyone to see or even presented as sketches of specific images. Like any effective brainstorming technique, discussion or debate is minimized until all the information has been presented. Next, guided by the facilitator, the group reviews this information together. Images that are agreed upon among the entire group are singled out and developed in greater detail, including key phrases and visual concepts. In the process, a single image of a preferred future begins to emerge.

In the final set of tasks in the creative visioning process, the conceptual material that has been developed through guided imagery, brainstorming and visualization is translated into a more conventional format. First, the consensus verbal and visual images are shaped into an overall descriptive narrative statement supported by more detailed graphic images. This statement is reviewed for its content, details and implications, and then revised and refined until it represents the consensus image of all participants.

CHAPTER 3
STEP THREE: DEVELOPING A MUNICIPAL TREND SCENARIO – FUTURE TRENDS AND REALISTIC CONSTRAINTS

PURPOSE

The third step in the VISION 2020 process is developing a municipal trend scenario. This step corresponds to the question "where are the trends taking us?" In this step, a series of tasks are outlined that will help a municipality develop a detailed a trend scenario for the local community in the target year, 2020. Based on available trends and forecasts, planned developments, and projected issues, the municipal trend scenario will establish a "probable" future for the community — all other things being equal. This scenario will provide a baseline against which potential alternative directions may be considered.

In developing a "trend scenario", municipalities are able to create a precise image of where their community — in all probability — is currently headed. This scenario can then be assessed for its potential impacts on the community and its consistency with prevailing community values. A trend scenario is a picture of the future environment that incorporates existing trends and forecasts, but also takes into account perceived emerging issues and the interaction among trends. Like all scenarios, it is developed through a relatively simple procedure involving a series of tasks: setting scenario parameters, organizing trend information, identifying scenario assumptions, developing the trend scenario, and presenting the final scenario. These tasks are outlined below. It should be recognized that the assistance of municipal administrative staff and/or professional experts may be required.

Reference should be made in particular to the "Ground Rules for Scenario Writing" (Appendix 2).

A. Setting Scenario Parameters

The first task in developing municipal trend scenarios is setting scenario parameters. Reference should be made to the Discussion Guide and its overall theme and time frame, because the end product of the 'trend scenarios' will be a trends future appreciation, described in the same way as the conclusion of Step 3 of the Discussion Guide. What the 'trend scenarios' developed here will permit is a more in depth appreciation of how trends are likely to affect us in future.

In addition to an overall theme and time frame, many scenarios also identify specific target issues to be examined within the context of the overall theme. Utilizing target issues promotes a clearer understanding of the major elements of a scenario theme and potential interaction among them. It also greatly simplifies incorporation of trend information in the development of the scenario. (Given the vast diversity among Alberta's local municipalities involved in the VISION 2020 program, and the wide range of issues they face, the identification of specific target issues is left up to participating municipalities).

B. Organizing Trend Information

The second step in preparing trend scenarios is organizing trend information.

The further that data ranges beyond the geographic focus of the municipality the less likely it will seem to be directly relevant. International and national trends material must be related locally for it to be effective in the preparation of municipal scenarios. Technical Resource #2 – Trends Guide for VISION 2020 and Technical Resource #3 – Compendium of Trends Selected by Agencies of The Alberta Government, should be extensively referenced. The papers are designed to narrow down the breadth of potential trend information and make it possible for the participant to access his information at his own personal level of interest.

Suggested sources of local trend information that a municipality might consider would include local or regional population, employment and housing forecasts and local or regional economic analysis. Your Regional Planning Commission may prove to be a valuable source of information of this kind.

C. The Single Scenario Approach

The simplest approach to scenario building is to develop a single scenario based upon trends. This is the approach adopted in Step 3 of the Discussion Guide where an absolute minimum of information is applied in question and answer format.

A more thorough analysis is permitted by selective use of the information contained in Technical Resources #2 and #3. Since the development of scenarios requires

special skills, the capability of the municipality to provide such skills should be examined prior to adopting this approach.

While there is no fixed approach to scenario development, this task includes projecting available forecasts and trend information to the target year, incorporating additional information such as major planned municipal developments, and speculating on possible emerging issues that might arise during the given time frame — all within the context of the basic scenario assumptions. In completing these activities, a rough image of the future environment begins to emerge.

Next, short descriptions of this future as it relates to the specific target issues that have been identified are drafted. Together, target issue descriptions present a more refined image of the future, while addressing issues of specific concern to the community. If desired, target issue descriptions can then be analyzed for their impact on one another, promoting an even deeper understanding of the implications of the scenario. This analysis can be accomplished by using a cross–impact matrix, see Chapter 5.

While many variations on scenario development are possible, the process as described above is comprehensive without being overly analytical or technical. It should prove very accessible to first time scenario developers, while providing ample material for the final presentation of the trend scenario.

D. Presenting the Scenario

Having completed the above sequence of tasks, the scenario development process is complete. All that remains is to translate this information into a statement on Future Trends and Realistic Constraints for consideration by the target audience. Most often, scenarios are presented in written format as short, descriptive narratives that ideally impact the look and feel of the future environment.

There are three basic ground rules for writing a scenario narrative: internal consistency, plausibility, and imagination (see "Ground Rules for Scenario Writing" in Appendix 2). The most effective scenarios are direct, engaging and non–literary in style. Often, they are supported by simple graphics — maps, perspectives, artists conceptions — that help envision the project. The most successful scenarios speak directly to their target audience and to promote any desired follow–up activities.

E. Analyzing the Scenario

A well-presented trend scenario should provide a community with a fairly detailed image of its future — one that is based on available trend information, planned municipal developments, and current assumptions about the future. In and of itself, such a scenario should prove enlightening to municipalities which have never been through a long range planning process or thought about their community much beyond the current budget cycle. The use of cross-impact matrix analysis as described in Chapter 5 may be of assistance here.

F. The Multiple Scenario Option

Unlike traditional forecasting techniques, scenarios are qualitative projections which do not presume to be predictive in nature. No scenario can be expected to be completed in reality and the future is always a combination of scenarios.

For this reason, some organizations such as corporations and large public agencies choose to develop multiple alternative scenarios, each scenario based on an entirely different set of assumptions about the future. Using multiple alternative scenarios may not be all that valuable when the real purpose of a scenario exercise is to develop a long range vision. But it is important to remember that a trend scenario — like any scenario — is always highly vulnerable to uncertainty and change.

Before municipalities embark on the development of multiple scenarios they should examine the staff and other professional resources that will be required to generate results.

In preparing alternative scenarios, one scenario usually assumes that current trends or policies will continue without significant disruption. Such a scenario is often called the "official" or "surprise-free" future. Additional scenarios are then developed detailing plausible alternatives to the official future. Taken together, these alternatives offer a range of possibilities within which the actual future may be expected to fall. It will be important to name each trend scenario by very carefully selecting words that describe its driving force e.g. "rapid growth scenario", "quality of life scenario", etc.

A word of caution is necessary. Alternative scenarios can become very complicated and time consuming to prepare. The value of multiple scenarios in municipal application is difficult to assess because experience of their application is limited.

For any group embarking on a futures project, careful consideration should be given at all times to the effectiveness of the activity. Where a community is faced with a potentially major event which may or may not occur, multiple scenarios have a great deal of merit e.g., a community very much subject to uncertain future developments of a major scale may wish to develop three or four alternative scenarios.

CHAPTER 4
STEP FOUR – VISION AND ACTION

PURPOSE

The VISION 2020 program is offering every municipality in the Province — regardless of size location or type of government — the opportunity to develop its own strategic vision for the future. This step corresponds to the question, "Where do you Choose to Go?" The process presented in VISION 2020 is a relatively simple procedure based on available community visioning models. More elaborate procedures will result in greater confidence in results, but are unlikely to yield very much more elaborate vision statements. The differences will be the degree of reliability with which the Vision Statement is regarded, its apparent validity with municipal decision makers and the general level of acceptance by the public.

A. Writing a Vision Statement

Regardless of the process employed, participants will undertake a final — and critical — task: preparing a vision statement. This statement is the culmination of the entire municipal visioning process. In one document it represents the definitive statement on preferred future directions for the community, the formal product to be shared and reviewed by constituents and other jurisdictions, and perhaps most important, the driving force that will motivate future plans, decisions and actions. If well done and skillfully presented, the vision statement will become the definitive work that inspires and guides the municipality — and the larger community — as they move into the uncertain world of the next century.

The contents of individual vision statements will vary widely, depending on the size, location and type of municipality, not to mention specific issues facing its future. Nonetheless, all municipal vision statements should address or incorporate the following major items: prevailing community values, community issues of overriding concern, tangible images of the desired future community, major goals and strategies for the future, and finally, specific new concepts and proposals. All of these elements have been produced during the course of the visioning process up to this point. They need only be effectively and skillfully summarized.

It should be noted that while findings of the preferred scenario or images from the creative visioning exercises should be encompassed by the final vision statement,

they should not be used as a substitute for this statement. The preferred future must be modified by the trends scenarios so that the vision statement is realistic. The vision statement serves a larger and more important purpose than simply capturing scenarios or visual images of the future. It should have a more formal and enduring quality.

An inspirational quality should not be above a municipal vision statement. If it is to inspire action, it must demonstrate a sense of idealism. Think of it as a kind of "bill–of–rights" for the community's future.

The best vision statements are written by the participants themselves. Professionals are frequently used as facilitators and to advance the process of consensus building. Some statements have been written in an hour. Others have required days of negotiation, consideration and reflection. Please remember that statements must be 'actionable'; and they must serve as the basis for the development of municipal action for the future. Whatever outreach program to the community is adopted, it is recommended that the final summary be attempted by the Council itself. It should not be left to administrative staff or major stakeholders to produce.

In order to realize its vision statement, a municipality must set goals for the future. In this step, a series of tasks are outlined that will help a municipality outline strategies for working towards its desired future in target year 2020. Based on the vision statement, this agenda will provide a long–range, community–wide action plan expressed as goals for the future, recommendations for action by major stakeholders and potential future actions.

B. Translating Vision into Action

This, in fact, is the purpose of an agenda for the future. An agenda for the future can help direct the community in moving from vision to action. In one sense, it is nothing more than a municipal recipe, detailing the ingredients and activities necessary in order to produce a preferred future. In a more profound sense, if properly presented it can serve as a policy "overlay" for the entire community and its many institutions, laying out specific long term strategies that will serve to guide both public and private decisions in the months and years to come.

C. Setting Goals for the Future

Setting goals is a standard planning technique for defining overall direction and therefore in determining specific strategies and actions. Most institutions, public or private, operate on an existing internal set of goals and objectives e.g. efficiency, low taxation, profit, etc. that help determine their daily activities. The setting of community goals as part of the municipal agenda is not intended to override or replace such goals and directives, but rather to provide a larger policy context uniquely oriented to the long term future of the community.

While goals for the future may be considered only advisory in nature, they have the potential to play a significant role in municipal and community-wide planning.

These goals, of course, would set the context for actions that are specifically detailed in the municipal agenda. In addition, they would ideally serve as a voluntary policy overlay for any major actions undertaken by a community institution — new agency plans, capital improvements, economic development strategies — that are perceived to be of long term significance to the community.

Such goals need not be long, elaborate or all-inclusive. They need only summarize the major concepts and items covered in the municipal vision statement. They might also be derived, in part, from the community values articulated as part of the municipal profile.

D. Priorizing Community Actions

The most important aspect of building a municipal agenda is identifying and priorizing the precise actions that will contribute to the creation of the things contained in the vision statement. In identifying major actions that correspond to specific goals, and their component activities, those institutions that might be considered "stakeholders" and a clear sense of do-able priorities should emerge.

Such actions and activities will take many distinct forms. Some may occur as recommendations for new local by-laws, institutions, or public services; others may entail changes or revisions in existing by-laws,institutions, or public services. Some

actions may surface in the form of proposals for new projects, developments or capital improvements; others may surface as proposals for the abandonment or restructuring of existing proposals.

Using a matrix (see Chapter 5) that covers the type of action, component activities, probable stakeholders, recommended timetable, and other relevant factors could be extremely useful in organizing and priorizing this information. Beyond this, actions might be best presented as a series of recommendations comprised of short descriptive statements, along with supportive information, interested groups, potential resources and contacts.

E. Involving Community Stakeholders

A critical element in the potential success of a municipal agenda is generating wider community support for its concepts, and interesting important stakeholders in participating in its recommended activities. There are a number of strategies that a municipality might use in developing such support and participation.

One major strategy would be to communicate the substance and findings of the entire visioning process to the rest of the community. In addition to the municipal agenda, each step of the visioning process has been designed to yield a brief document or summary report: a municipal profile, a municipal trend scenario, a municipal vision statement, and, finally, the agenda itself. Making all or a combination of these documents available to the public might provide an easily accessible summary of the process and, in the process, build a better understanding of its recommendations.

An additional strategy would be to arrange one–on–one meetings with major stakeholders that are in the visioning process and its findings. Still another strategy would be to organize meetings and presentations for the community at large in which the same summaries are presented. Finally, if there is a sufficiently high level of interest and available resources, a municipality might even seek to recreate portions of the visioning process itself — creating a municipal vision, for example — for a larger group of participants from the community.

F. Identifying Future Actions

A final component of the municipal agenda is to identify those potential community recommendations that are not yet fully conceptualized, may require more background information and investigation, or simply warrant further discussion and consensus–building.

The point is to identify whatever "next steps" are required so that these bright ideas are not lost in the shuffle back to the community of the present and its short–term orientation. Some ideas may be assigned to special study groups, others may be the subject of negotiations with major community stakeholders, and still others may simply be put on hold until the timing is right or the next step becomes clear. Serving as a watchdog for these potential future actions is an important role best played by the municipality itself.

G. Follow Up

The vision statement will identify the future characteristics of the community in ideal but realistic language. This should ensure that it has a lasting quality.

The greatest benefit of such a statement will occur if it receives wide acceptance within the community. Then it will serve its main purpose of unifying the multitude of decisions made each day by both the public and private sector that effect the quality of your community. To this end you may wish to use some of the public participation techniques provided in Technical Resource #4 to field test the vision statement and the agenda. This would provide valuable insight in the general acceptance of the vision statement and may result in some very innovative suggestions for the agenda.

Secondly the vision statement needs to be distributed to all boards, commissions and even to service clubs, chamber of commerce etc., the wider the distribution the better it will serve the community.

When new members are appointed to such bodies, copies of the vision statement and the agenda should be made available. New leaders could be asked to "buy in" to the statement when they join the various boards and commissions.

Thirdly when major decisions are required, the issue should be referenced to the vision statement, often it will be surprising how clear the issue becomes and how easy the decision will be when put in the context of a lucid vision statement.

Fourthly whenever Council considers a new program such as the annual budget, a new general plan, a downtown revitalization plan, etc. the vision statement and the agenda should be brought forward to provide the framework.

Fifthly, Councils could consider sharing results with neighbours. This may be particularly important since implementing part of the vision statement may involve joint action with adjacent municipalities. It is conceivable that a shared vision with neighbours could lead to very positive joint action to implement both their goals and yours.

Finally, from time to time—say every three or four years—the activity should be revisited. An opportunity should be created to assess new trends and see how trends previously identified have developed. A further benefit would be to examine how the experience gained in the VISION 2020 program will help develop clearer vision statements and create more effective action plans. It is very important also to re-assess whether the documents still conform to the wishes of the community in the light of then-current realities. It may be that circumstances have changed so radically that the original results need a complete overhaul.

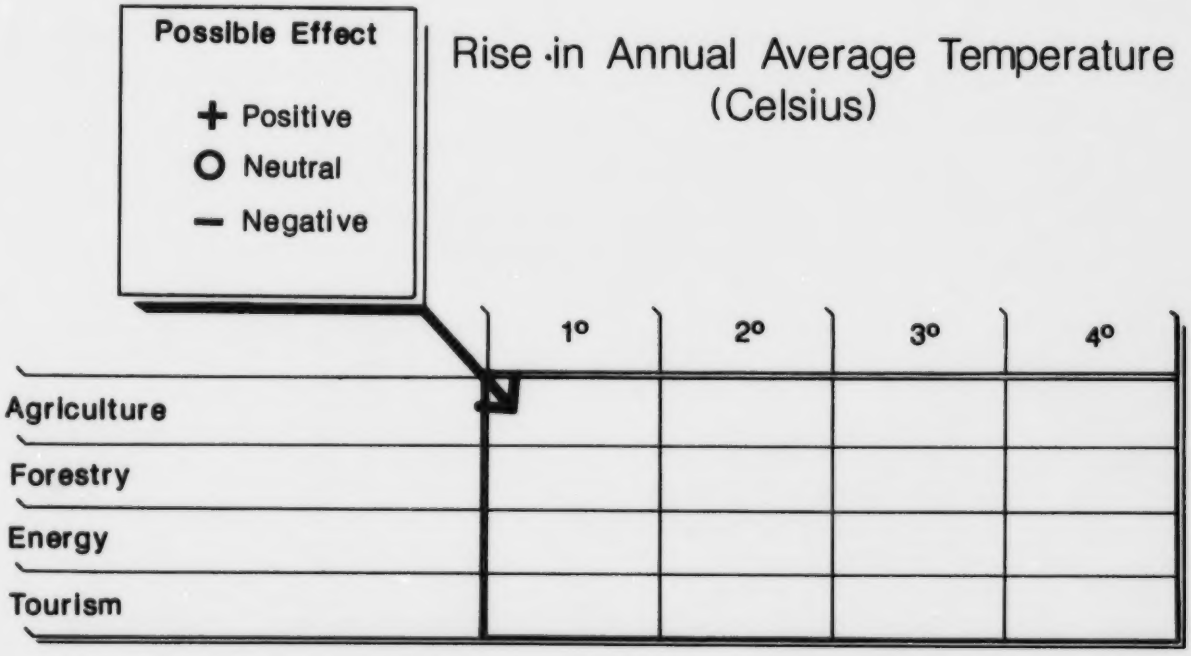
CHAPTER 5
CROSS–IMPACT MATRIX ANALYSIS

Cross–impact matrix analysis is simply a method to compare the relationship between two sets of information. The most common matrix used is the mileage chart on provincial road maps. It allows you to compare the distance between Calgary and Lethbridge with the distance between Edmonton and Camrose.

The information on the top and the side can be the same (e.g., cities/towns) or different (e.g., trends and issues). The key is to formulate the right question and to make certain that the information sets along one axis is uniform and carefully constructed.

For example:

Question: What is the effect of a rise in annual temperature on the basic industries?



In many areas of the VISION 2020 process cross–impact matrix analysis would provide a better understanding. For example, it may show that some community characteristics are strongly affected by major issues that have been identified. Alternatively, it may show a strong relationship between your aspiration for your community and trends. Sometimes a Matrix will show that two elements of your vision statement are incompatible.

The best time to use the matrix analysis is during the summation by the facilitator at the end of each step. It will sharpen the statements and allows direct input by all participants into the final results recorded.

Using cross–impact matrix techniques is not essential for completing the discussion guide, however it will help participants to better understand the relationships between trends, issues and characteristics.
On the next four pages are illustrations of matrix analysis using elements of the VISION 2020 discussion guide. Each is a little different to show how different techniques can be used.

One word of caution: cross–impact matrix analysis only works if people are familiar with the information sets being compared. For VISION 2020 purposes this means that only persons familiar with the local community should determine the interrelationships.

Question: What is the effect of community characteristics (A) on community issues (B).

Characteristics/Issues

Possible Effect

+ Positive

⊙ Neutral

– Negative

B. Issues

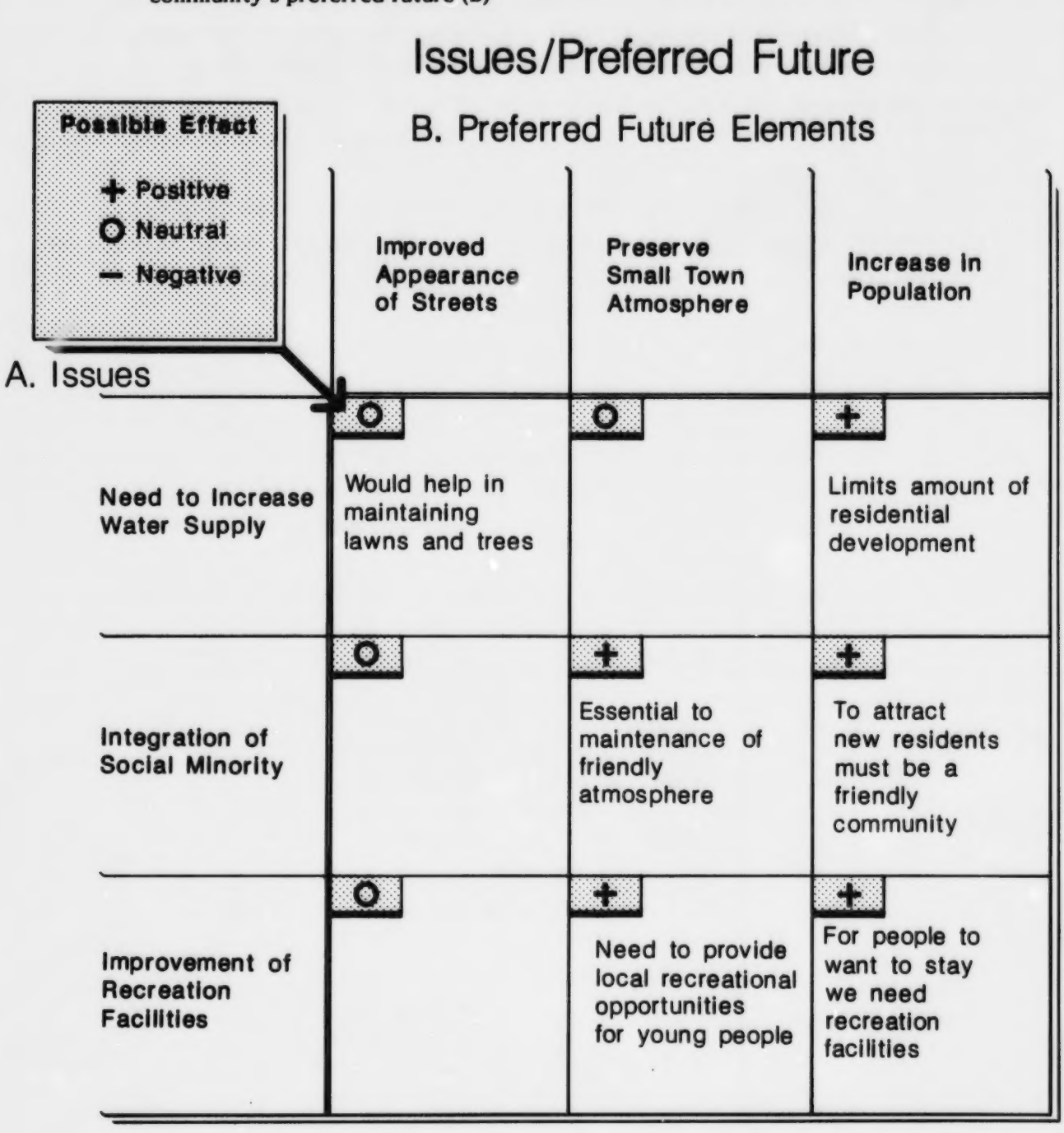
A. Characteristic

	Need to Increase Water Supply	Integration of Social Minority	Improvement of Recreation Facilities
Agricultural Service Centre	– Demand for water for use in food processing	⊙	⊙
History of Self Reliance	+ Willingness to accept responsibility for providing services	⊙ Could help, if there is an awareness of the need for integration	+ Volunteers ready to pitch in
Excellent Education Opportunities	⊙	+ Help a lot. Provide meeting opportunities	⊙

In this hypothetical example, self reliance is prized above the other two characteristics.

It is important to note that in another community the conclusion could be very different. For example, in a community where the educational institution is expanding it could help provide more recreation facilities and justify increase in the water supply.

Question: What is the effect of community issues (A) on elements of the community's preferred future (B)



The conclusion of the above hypothetical example is that improving the appearance of the streets does not depend on solving all issues, but to increase population does require action on all fronts.

If council decides that preserving a small town atmosphere is most important then social integration becomes top priority.

In this example trends are compared against trends. There are now two questions: How does Trend A affect Trend B, and how does Trend B affect Trend A.

Trends/Trends

Possible Effect
+ Positive
O Neutral
— Negative

B. Trends

A. Trends

	Aging Population	Increasing Non-Agricultural Employment	Increasing Frequency of Retraining
Aging Population		— Increase will attract young families, reducing average age	O Retraining does not increase rate of aging
Increasing Non-Agricultural Employment	O Aging will not change employment mix		+ Increasing demand for retraining will focus activity away from agriculture
Increasing Frequency of Retraining	+ As the population ages more retraining will be needed	+ Increasing non-agricultural employment will increase demand for retraining	

The trends to watch are those that are reinforced by another. Piggy-backed trends could have significant impact. Trends that cancel each other out can be ignored.

To establish priority for action items a comparison can be made with elements of the Vision Statement. Question: How will proposed action items (A) affect elements of the Vision (B)?

Action Items/Vision Statement

Possible Effect

+ Positive

O Neutral

— Negative

B. Elements of Vision Statement

A. Action Items

A. Action Items	Improve Appearance of Streets	Preserve Small Town Atmosphere	Maintain Reasonable Population Balance Young/Old
Organize Three Cultural Events Each Year	+ May provide decorations	+ Provides opportunity for volunteer effort	O
Extend Intake To Lake	+ Provides water for lawns and trees	O	+ May allow some population expansion
Build a New Arena Jointly with County	O Does not affect streetscape	+ Provides a focal point for community	+ Improves attractiveness of town for young families

In this hypothetical example, extension of the water intakes would have the most beneficial effect on the three listed elements of the Vision Statement.

PART TWO

MUNICIPAL VISIONING

CHAPTER 6
FROM FORECASTING TO FUTURES PLANNING

A. Introduction

Over the last several decades, public and private sector institutions in western countries have become more involved in long range planning. In the public sector, such planning has been the realm of large bureaucracies and the more senior levels of government. In the private sector, many large corporations have furthered organizational objectives through the development of corporate or strategic plans: identifying long term issues, developing goals to address them, implementing actions that further such goals, and then evaluating the success of their actions.

From simple population projections to sophisticated econometric models, forecasting has been the major long range planning technique used by such institutions. For example, most large institutions in Alberta — agencies of the provincial government, corporations and utilities — have relied on some form of forecasting to plan ahead. Because of the dominant role it plays in institutional planning, forecasting has come to wield tremendous influence over major public and private sector decisions — from the formation of provincial policy to long term capital investments.

Most forecasts are constructed on the basic premise that the future will be an extension of — or variation on — the recent past. The purpose is to "extrapolate" a future operating environment for which an organization may plan with some degree of certainty. To the degree that a forecast is accurate, it may serve as an invaluable planning tool for an organization; to the degree that it is inaccurate, a forecast may prove to be irrelevant, misleading, or even potentially harmful. In terms of statistical reliability, demographic forecasts are normally viewed as being valid 15 years into the future. Technological forecasts are seen as usefully reliable 7 to 10 years. Economic forecasts are seen as reliable no more than 90 days.

B. Forecasting in an Uncertain World

Throughout the 1950s and 1960s, forecasting worked reasonably well as the major long range planning technique in large public and private sector institutions. This was due, in part, to the relative stability of the times. Generally speaking, the post-war era in Canada represented a period of long term economic expansion,

steadily rising consumer expectations, and relatively few disruptions in the political or economic environment. Basic assumptions about our nation, the structure of its economy, and the realities of the world around us, did not change considerably.

However, since the early 1970s, Canada has seen the rise of an increasingly fluid and turbulent planning environment, with a corresponding rise in the degree of environmental uncertainty encountered by its major institutions. Many of the most basic assumptions that traditionally shaped our view of the future have begun to change. Not surprisingly, forecasting errors have also been more frequent and, on occasion, of dramatic magnitude. This has sometimes led to negative consequences for those organizations that have failed to predict the future correctly.

For example, financial difficulties have been developed for a number of Alberta municipalities which developed serviced industrial land in the late 1970s in the expectation that the provincial economic boom would continue. When the boom collapsed, some municipalities were left with a relatively large number of vacant lots the cost of which must now be recovered from local property owners through taxation.

Most planners and managers know from experience how inaccurate forecasts can be. Sooner or later, a forecast will fail when it is most needed because it has not accounted for shifts in the operating environment that have rendered current assumptions about the future obsolete. The solution is not to attempt to perfect forecasting techniques or prepare more and better forecasts, because no single "right" projection can be deduced from past behaviour when the future is potentially a matter of multiple directions.

C. Futures Planning and the Private Sector

With the growing recognition of change and uncertainty over the last decade, the emphasis on long range planning in major public and private institutions has begun to shift. Many institutions are beginning to augment traditional forecasts with more qualitative techniques that view the future in a larger, more open context.

Increasingly, corporate and agency planners are involved in programs that assess the impact of societal trends, explore alternative organizational directions, or promote

the development of long term vision. One of the more widely–used planning techniques that incorporates all of these activities is scenario development.

Using scenario development, an organization can build a relatively complete image of its future operating environment, incorporating current forecasts, but also taking into account the impact of emerging issues or the interaction between trends. In addition, alternative scenarios can be used to test different sets of assumptions about the future. The resulting image/s can be compared to existing organizational objectives, which may then be adapted to fit the anticipated new environment. As such, scenario development offers a highly effective tool for dealing with change and uncertainty, allowing an organization to take a more active role in envisioning and creating preferred directions.

Among the earliest and most effective corporate users of alternative scenarios was the Royal Dutch Shell Company, a multinational oil company based in London and the Netherlands. Beginning in the late 1960s, Shell planners instituted a phased scenario development program to model the uncertain environment of the highly volatile world oil market. Shell's early scenarios focused on the "raw uncertainties" faced by the company, while later scenarios targeted the day–to–day operational setting of company managers. This program proved uncannily well–timed. With the arrival of the oil embargo of October 1973, Shell managers were well–versed in thepotential contingencies of the situation and ready to respond. In the early 1980s, scenario development helped Shell anticipate and respond to the international oil glut and subsequent collapse of world oil markets.

D. Futures Planning and the Public Sector

While corporations and other private sectors interests were beginning to experiment with new futures planning techniques, a parallel development began to occur in the public sector. Beginning in the early 1970s, public institutions throughout the United States and in a number of countries around the world became more actively involved in planning for the future.

The challenge facing the public sector, however, was much more demanding than that of the private sector. Public institutions were not simply concerned with the

future environment of a particular enterprise, but entire populations and the range of critical issues confronting their future. From employment and economic development to education and the environment, the sheer volume of complex issues to be considered in planning for the future was staggering. In addition, democratically–elected governments were obliged to incorporate some form of public involvement in addressing these questions.

As a result, the twin goals of increased future–responsiveness and broad–based citizen participation became the theme of an entire generation of public futures programs. In the United States, numerous large cities and well over half of all state governments inaugurated such programs over the course of the decade. Futurist Alvin Toffler collectively described these programs as the "anticipatory democracy" movement. Essentially, the intent was to create a base of popular support for foresight and long range leadership in public institutions or, as Toffler noted, "a constituency for the future".

Many of the state and local futures programs created during the 1970s were initiated by their respective political leaders. While their titles were very similar — Goals for Georgia, Commission on Minnesota's Future, Texas 2000, Massachusetts Tomorrow — the purpose and structure of these programs varied widely, as did their degree of public involvement and length of duration. Most were one–time planning efforts that were restructured or disassembled with a change in leadership.

Among the most common futures program activities were research, public conferences and workshops, media presentations, public polling, legislative foresight sessions, alternative scenario development, and the preparation of reports and recommendations. Among the most frequently–discussed issues were economic growth and quality of life, agricultural preservation and productivity, government service delivery and citizen participation, environment and natural resources, transportation, energy conservation, public education, and comprehensive land use planning.

There was also a general evolution of public futures programs during this period — from basic goal–setting efforts which were relatively unsophisticated in their analysis of long range issues, to much more rigorous endeavours which emphasized the analysis of future trends, identification of alternative policy choices, and development of visions for the future. Recognized as among the most successful

programs were the very first state-initiated futures program, the Hawaii Commission on the Year 2000 (1970–1981), one of the more elaborate public involvement schemes, Alternatives for Washington (1974–1976), and the innovatively-designed Colorado Front Range Project (1979–1981).

By contrast, Canadian experience with public or semi-public futures programs has been very limited. Among the most noteworthy are the Royal Commission on the Economic Union & Development Prospects for Canada, Yukon 2000 and the Committee on Toronto 2000.

While the anticipatory democracy movement has yet to be thoroughly researched for its long-term impact on the governing process, its legacy is already undeniable. By 1987, over 160 state and local futures programs had been undertaken in the United States alone, with 60 programs still in operation. New programs continue to be created every year. Undoubtedly, countless other futures planning efforts quietly sponsored by community organizations and social service agencies at the local level have not even been included in the national inventories of such efforts.

With the pace of societal change accelerating in the late 1980s, long range planning in the public sector is gaining recognition as an indispensable tool in the governing process. Futures programs that emphasize innovative new approaches and techniques are becoming an integral part of the long range process in public institutions. Local governments are moving to the forefront in their use of such techniques, including the development of visions for the future and in Chapter 8, we examine some of the most successful futures programs, including their use of the visioning process.

CHAPTER 7
THE VISIONING PROCESS IN ACTION

Since the first large-scale anticipatory democracy program initiated by the state of Hawaii in 1970, futures programs have become an important part of the long range planning process in public institutions in America. And futures programs organized at the community level — whether they are sponsored by local government, private sector groups, or a combination of community sponsors — have also become more common. In general, these futures programs have gravitated toward an emphasis on the development of a vision for the future.

This chapter provides an overview of several successful and widely divergent futures programs that have been conducted to date, focusing on their process, products, and perceived benefits. In part, these efforts were selected for closer examination because one or more of their program components — process design, major issues examined, and level or focus — have contributed to the development of Alberta Municipal Affairs' VISION 2020 program. In addition, all of them focused in some degree on the use of a visioning process.

Not surprisingly, the following summaries have been drawn from the American experience, where the anticipatory democracy movement has provided a large number of potential case studies. While no single program is meant to serve as a complete model for Alberta municipalities, collectively they provide documented evidence that governments and communities of all types and sizes across North America are actively involved in creating preferred directions for the future.

Willamette Valley Choices for the Future

A comparatively small geographic area, Oregon's Willamette Valley is home to the vast majority of that state's population. It is also one of the most diverse and productive agricultural regions in the world. In 1970, faced with the prospect of uncontrolled growth and urban sprawl, the state-sponsored Willamette Valley Environmental Protection and Planning Council formed Project Foresight (1970–1972). This was a two-year planning effort designed to examine alternative futures for the Valley that might preserve its rich agricultural lands, natural environment, and high amenity quality of life.

In order to focus public attention on potential choices for future development in the Valley, Project Foresight employed a scenario development process. Based on trend information gathered and analyzed by the project, a team of consultants prepared an elaborate visual guide on the major land development alternatives in the Valley to the year 2002. The resulting report, Willamette Valley Choices for the Future, presented two distinct and dramatically different scenarios for the Valley's future.

Scenario I (the "probable" future) assumed that all factors then controlling development in the Valley would continue apace, and that no new controls or changes would be introduced. (For example, people would continue to rely on the automobile as they had in the past, with the resulting increased impact on traffic congestion and air pollution.)

Scenario II (the "preferred" future) assumed that new attitudes based on maintenance of environmental quality and a high-amenity lifestyle would involve changing the way that people would live together in the Valley. (For example, people would come to rely less on the automobile, with the resulting increase in mass transit ridership and other alternative modes of transportation.)

Both scenarios covered a number of development-related subjects, including land use, transportation, open space and recreation, employment, pollution, energy and intergovernmental relationships. These target issues, in turn, were examined for their impact on one another under both scenarios. The result was a graphically vivid depiction of the major choices and trade-offs facing the Valley in terms of its future development patterns. A number of novel ideas and developmental concepts were explored in Scenario II, and citizens were encouraged to write their own alternative scenarios.

In addition to bringing long range planning perspectives on the future of the Valley into the public limelight, Project Foresight set the pace for the ensuing land-use debate in Oregon. Ultimately, this dialogue resulted in the state's nationally recognized comprehensive land use planning system.

Alternatives for Washington

Alternatives for Washington (1974-1976) represents one of the most extensive government-sponsored futures programs ever conducted. This program was designed

to allow as many citizens as possible to examine issues facing the state of Washington and to determine a common vision for its future. During its three-year tenure, nearly 100,000 Washingtonians participated in an elaborate public involvement process.

In the mid-1970s, Washington was still relatively undeveloped compared to other American states, having yet to experience the negative impacts of uncontrolled growth and haphazard development that many had sustained. There was a strong conviction that the state had a rare opportunity to create a different and very desirable future for itself — if only it would seize the moment. The Alternatives for Washington futures program was created to enable citizens of the state to fully participate in such an effort.

During phase one of Alternatives for Washington (1974-1975), several techniques were employed to attract large scale citizen input. Initially, a "Delphi" survey of 2,500 citizens was used to develop information on trends that would affect the future of the state. Next, 150 people representing the state's diverse population and geographic areas were selected to serve on a statewide task force. This task force met in a series of three-day seminars to examine such trends and develop a range of options for future growth and development in the state.

Ultimately, the task force identified 11 alternatives articulating preferred directions for the state's future, which became the basis for a number of broad-based public involvement events. These alternatives were not so much free-standing scenarios as they were interconnected and sometimes mutually-supportive visions. They included visions of the state as a diversified agriculture and forestry economy, an outdoor recreational paradise, a centre for Pacific Rim trade, a society of decentralized communities, a science and technology mecca, and much more. Through a series of ten regional conferences covering the entire state, 1,200 citizens examined each of the 11 alternatives, identified areas of potential agreement and disagreement, and added local perspectives to the proposed state policies that accompanied them.

Next, in a series of television programs supported by viewer call-in and newspaper polls, the public-at-large was encouraged to register its preferred alternatives and supporting policies. Over 45,000 responses were tabulated. While three alternatives

received significant support, no single alternative clearly dominated public preferences. The program then conducted a statewide scientific random sample survey of 6,000 people which verified much of the earlier public input. Out of this phase evolved a composite vision for the future of Washington.

The second phase of Alternatives for Washington went on to conduct seven separate cost–benefit studies in order to analyze the real world costs of implementing major proposals. The results of these studies, and subsequent public feedback, were summarized in the project's final publication, Agenda for the Future.

To analysts of Alternatives for Washington, the value of this program was undeniable. For the first time in the state's history, it had developed a broad sense of public opinion regarding the future, as well as a number of specific policy proposals as to how it might get there. While this enormous undertaking had both procedural and substantive shortcomings, one of the major lessons learned was that too much emphasis was placed on statewide alternatives, and that not enough attention was paid to developing a sense of vision at the level of individual communities.

The Colorado Front Range Project

The Colorado Front Range Project (1979–1981) is considered to be one of the most innovatively–designed futures programs of the last decade, involving local communities across a large and growing region in planning for their future.

The Front Range region of Colorado encompasses 13 counties covering 17,000 square miles stretching 200 miles along the east slope of the Rocky Mountains from Fort Collins to Pueblo. It is home to more than 80 percent of Colorado's total population in a rapidly developing conurbation of 31 municipalities ranging in size from 2,000 to over a half million (Denver).

In the early 1980's, the Front Range region faced a projected doubling of its population base over the next twenty years, with a host of projected growth–related impacts on its development patterns, resource base and quality of life. With virtually no history of statewide comprehensive land use planning and little

consensus on a long range development strategy for the region, the Office of the Governor set out to examine the question of how the Front Range might effectively and desirably accommodate this future growth.

Based on concepts proposed by Canadian industrialist Maurice Strong, the Front Range Project was created as a "top–down and bottom up" public process that was open–ended, participatory and bi–partisan, included representatives of both the public and private sectors, and oriented to the region's long range future. Five subject areas were selected as the focus of the project, including transportation, patterns of development, natural resources, governmental services, and visions for the future.

The Project's framework of analysis was based on four very simple but extremely effective questions:

- Where are we now?
- Where are the trends taking us?
- Where do we want to go?
- How do we get there?

Starting with these questions, the Front Range Project was initially structured around a number of special task forces, county committees, and county level forums. Gubernatorily–appointed task forces for each of the five selected subject areas examined trends and issues common to the entire Front Range. In addition, 13 county committees, composed of local government officials and selected citizen volunteers, identified future trends and priorities for their respective counties and local communities. County forums were then held to bring the work of county committees and task forces together in order to produce recommendations for consideration at a regionwide conference. The process was subsequently restructured around nine new subject area work groups based on conference findings.

During its first year, the Front Range process focused on developing substantial agreement on the major problems and opportunities resulting from rapid growth in the region. In addition, alternative futures were examined for local communities, with a consensus emerging on the major characteristics of a desired regional future (see Appendix 3).

During its second year, the process focused on the development of specific recommendations for both public and private action from a futures perspective in

the nine working areas. The eventual result of this two-year participatory process was the Program to the Year 2000, a comprehensive body of recommendations written in its entirety by volunteers and agreed upon across broad political perspectives and differences of opinion.

A central focus of the Front Range process was the drafting of Our Desired Future, a vision statement on preferred directions for the future of the Front Range. Presented at the first regionwide conference, this statement was based on the input of literally every one of the 1,500 participants active in the various task forces, county committees and county forums during the first year of the Front Range process. Eloquently stated, it emphasized such concepts as individual self-reliance, decentralization of decision-making, promotion of economic diversity, conservation of natural resources, and protection of open space in the Front Range.

To organizers of the Colorado Front Range Project, this visionary element of the process was the single most valuable tool in enabling participants to consider issues confronting the future of the region — particularly at the community level. It demonstrated in a very clear way where potential solutions to problems identified by the process could be found, providing an accurate reflection of the prevailing political reality and the kinds of change that might be implemented in the future.

Tri-County Tomorrow (Peoria, Illinois)

While state-level futures program received a great deal of public attention over the last decade, locally-oriented programs were much less prominent. In recent years, however, community-based futures programs have begun to grab the spotlight. Building on the pioneering work of larger political jurisdictions, and often taking advantage of new and more innovative visioning techniques, these programs are addressing an entirely new generation of public issues and concerns. One such effort is the Tri-County Tomorrow program (1986-1988), based in Peoria, Illinois and encompassing the surrounding three-county area.

Located on the Illinois River in west central Illinois, Peoria is the oldest continuously inhabited city in the state. In popular folklore it has traditionally symbolized the heartland of practical, conservative American values ("Will it play in Peoria?"). The Peoria region is home to over 350,000 people and a well-established

manufacturing and agricultural economy, including the internationally-known Caterpillar corporation. Beginning with the national economic recession of 1981-82, and the subsequent employment dislocations in its manufacturing industries, the local community begin to realize that a new vision for the Peoria region and its future economy was necessary.

First formed in 1986, the purpose of the Tri-County Tomorrow program was to identify the optimum achievable economic scenario for the Peoria region in the year 2000 and beyond, and to determine methods by which the community could mobilize its political, social and economic resources to achieve such a scenario. The initial result was a collection of visions representing a range of potential opportunities for the region over the next 25 years. These visions were followed with a community-wide implementation effort focused on specific actions.

Leadership for Tri-County Tomorrow came from a variety of sources, including the Peoria Area Chamber of Commerce, the Economic Development Council for the Peoria Area, the Mayor's Office of the City of Peoria, and two local universities. Following a series of organizational meetings among these groups early in 1986, a project steering committee was formed to guide the development of the Tri-County program. A former Mayor of Peoria was selected to serveas project coordinator. In addition, the project secured the guidance of the former project director of the statewide Illinois 2000 project (1978-1980).

Initially, two major working groups were formed to guide the Tri-County Tomorrow visioning process. A "Creative Futures Group", comprised of 25 individuals representing a variety of organizations and disciplines from the community, was created to explore national, state and local trends and to develop a preferred scenario for the future. In addition, a "Community Leadership Group", comprised of 225 representatives from throughout the region, was assembled to review the work of the Futures Group and to advise in its efforts.

To begin, the Creative Futures Group focused on the development of five alternative scenarios for the future of the Peoria region, reflecting different challenges and opportunities that might be encountered by the community over the next 25 years. Using imagery that reflected the region's river heritage, (Drifting Along, High-Tech/High Tide, Flowing Through the Heartland, Global Currents, and Down the River), these scenarios detailed possible futures ranging from the rise of a

local information/service–based economy to the accelerated political and economic consolidation of the region. They also encompassed "business as usual" and "worst case" alternatives.

Next, with the input of the Community Leadership Group, the group embarked on an intensive one–month effort to condense the most realistic and desirable components of each of these five alternative scenarios into an overall preferred scenario — or vision — for the future of the Peoria area. The result was Heartland 2010: Banking on Ourselves, a highly–detailed vision statement rich in specific ideas and proposals.

Following the development of its preferred scenario, the Tri–County Tomorrow program moved into an implementation phase. A working group was formed to solicit the participation of businesses, public institutions and community groups from throughout the region in this process. Some 75 community initiatives for attaining the Heartland vision were identified for potential action by local organizations.

These included such diverse strategies as the development of a local agricultural/technology consortium to promote innovation in the area's existing agriculture/manufacturing economy, a tri–county governmental consolidation proposal, and formation of a Heartland Venture Capital Chest.

From the outset, the Tri–County Tomorrow futures program placed a strong emphasis on creativity. The opinions and ideas of numerous outside resource people were consulted during the course of the visioning process. In addition, a number of creativity–promoting techniques were employed to ensure that process participants got outside "The Box" of unimaginative, conventional thinking in developing a vision for the future. Since that time, the Tri–County Futures program has been cited as one of the most creative futures programs of the last decade, and its "Heartland 2010" vision statement described as a work of "high–level creativity".

With its implementation process now fully underway, Tri–County Tomorrow program has acknowledged that its visioning process will likely need to be repeated — and its vision statement continually updated — as the community actually moves forward into the future. For the Peoria region, the integration of a long range perspective

into the daily activities of government, business and the community at large has been accepted as a matter of due course. The future, it seems, will definitely play in Peoria.

Yukon 2000

In 1986, the Yukon Government responded to recent mine, mill and railroad closures by initiating a planning process leading to an economic development strategy for the territory. The scope of the process was not confined to purely economic matters, however. Related social matters were dealt with, where appropriate.

The basic question which the process set out to address was "what kind of place do we want the Yukon to be in the year 2000?" The collection and analysis of answers would, it was hoped, create a common understanding among Yukoners of economic development opportunities in the territory and identify ways in which the private sector and government could co-operate in building a stronger economy.

The process began with a workshop at which representatives from key interest groups debated goals, objectives and issues related to the development strategy. The government subsequently published a public discussion paper ("Building the Future") to inform the public of the workshop participants' conclusions and solicit comments. After a series of industry and community consultations, a conference was held to review progress and discuss options. Goals for the strategy were agreed upon (see Appendix 3) and further rounds of consultations held. Following a second major conference, the government released its strategy document early in 1988.

The goals which formed the foundation of the strategy were the option to stay in the Yukon, control of the future, an acceptable quality of life and equality. Accordingly, the extent to which these goals are met will indicate the relative success of the strategy. Furthermore, the government itself indicated that all new policy or program proposals should be evaluated for their assistance in meeting these goals.

The strategy document deals with each major aspect of economic activity separately but using a common format. In each case, the government states what steps it will take to meet the goals of the strategy with respect to the matter at hand. It then gives details of actions it will take immediately, in the medium term and in the long term.

The implementation of the strategy will be monitored by the Cabinet to ensure that government budgeting and departmental programs reflect the strategy's priorities. The Yukon Economic Council will monitor progress on behalf of the public.

Passport to the Future (County of Vulcan, Alberta)

The County of Vulcan lies in a mixed grain and livestock farming area in southern Alberta. Its Council is the co–sponsor with the local Board of Education, the local Chamber of Commerce and Alberta Agriculture of an annual one–day conference entitled "Passport to the Future", first held in 1987.

The local government, recognizing that the future is rapidly bringing changes which could affect the quality of life in area communities dramatically, sees the conference as a means of acquainting residents and business people with trends and new ideas. The participants may then use the acquired information to their advantage in their personal and family lives and in their work.

The conferences to date have focused on the future of agriculture, energy, the global economy, education and the family, with particular emphasis on the local impacts of the changes in these areas. At the 1989 conference, "the information age" will be one of the topics. Speakers are drawn from Alberta and beyond, and include some of Canada's best–known futurists.

By looking into the future and trying to make adaptive changes today, the County is doing much the same as municipalities who undertake Step Three of the VISION 2020 process: exploring future trends and realistic constraints. By making a deliberate effort to see what the future may hold, the County will be well prepared to meet the challenges and opportunities which the 21st century will bring.

APPENDIX 1

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Please feel free to call the VISION 2020 office at 422-2020 if further references are required.

APPENDIX 2

GROUND RULES FOR SCENARIO WRITING

SCENARIO WRITING

Scenario writing represents the "creative" phase of the scenario development process, involving more latitude than any other activity. There are probably as many styles and approaches to scenario writing as there are scenarios. Even so, following three simple ground rules will help ensure that this phase of the process stays on course:

Internal Consistency. A scenario's narrative events should be highly consistent with one another and with the assumptions that define the scenario. An "internally–consistent" scenario does not mix thematic apples and oranges, but sticks to the essential view of the future that is characterized by the scenario. Think of a scenario as a "prototype" future, rather than a comprehensive future that tries to incorporate every contingency.

Plausibility. A scenario narrative should present a future that is entirely plausible. Note that plausibility does not necessarily mean probability. Most scenarios — even trend scenarios — involve some narrative events that may seem less than probable. But the scenario will be plausible as long as these events closely follow the scenario's basic assumptions about the future. A related tip: avoid disaster scenarios like the plague.

Imagination. More than editorial skills, a scenario writer needs to weave narrative events together in an imaginative way that breathes life into the scenario. An imaginative scenario will "stretch the mind", enabling one to develop totally new insights into the future. Without plausibility, a scenario may be unbelievable; but without imagination, very little learning about the future will take place.

APPENDIX 3

EXAMPLES OF VISION STATEMENTS PREPARED IN NORTH AMERICA

STATE OF NEBRASKA

The Nebraska Legislature is administering a futures project entitled "New Horizons for Nebraska – Developing a Strategic Outlook for the Nebraska Legislature". The following description of the preferred future for the state resulted from the deliberations of the New Horizons Forum on the Future (a representative group of citizens) at a meeting on March 9, 1988, and appeared in New Horizons Update, 1, 2, Fall 1988.

A Statement of Vision for Nebraska

(Nebraska as described from a point of reference sometime in the future, looking back.)

"After enduring the economic and social turmoil of the late 20th century, Nebraskans have successfully adapted to the changes that have taken place. We have preserved and enhanced the "Good Life," building on a foundation from our past and availing ourselves of the opportunities and challenges of the future. We have taken advantage of our strong work ethic and value system to create an economically viable and environmentally sustainable state.

We are in the midst of realizing a vision for the future first developed during the late 1980s. This vision has helped us to adopt a proactive stance toward our future, aggressively pursuing a set of realistic goals. By rewarding creativity and innovation, we have created opportunities for all Nebraska citizens to pursue their dreams. We are a state receptive to and, indeed, stimulated by cultural and economic diversity.

Much of our success is the result of a positive attitude and the projection of a progressive image of ourselves and our state. We have focussed our attention on what we do well and promoted a "can–do" spirit that has revitalized and stabilized Nebraska. We have taken a number of educated, informed risks that have allowed us to create and capitalize on our competitive advantages.

A major component in Nebraska's revitalization has been spiritual development. Building on a strong moral and ethical value base, we have developed a just, compassionate society. There is concern for all citizens and opportunities exist for those who choose to take advantage of them. There is an abiding respect for human rights regardless of age, sex, race, ethnicity, or religion.

Our citizens with mental and physical impairments enjoy a life that is well integrated into the mainstream of our communities. They have full access to employment, education, and recreational opportunities. The stigma associated with these disabilities has virtually disappeared, and these people are able to reach their full potential with minimal restrictions on their liberties. Their needs for basic and specialized services are met by a responsive system of quality human services.

We have restored the viability of rural Nebraska and successfully reversed the out-migration of educated, talented people. Our state is unified and cooperative: urban and rural, public and private. Nebraskans have recognized that we are part of a global network, creating partnerships around the world that are mutually beneficial. Similarly, our smallest communities are linked in a variety of ways to regional and statewide resources.

The agricultural sector continues to provide a strong base for the Nebraska economy. As a result of leadership during the transition period of the 1980s and 1990s, agriculture in our state has become more diversified and self-sustaining. We have developed a vibrant ag system from the production through processing and marketing, adding value to our predicts and providing jobs for our citizens.

We recognize the immense value of our natural resources and environment. Nebraska farmers and ranchers continue our heritage of stewardship, drawing the optimal economic benefit from our abundant natural resources while maintaining the quality of our land, air, and water. Our urban areas have provided leadership in recycling wastes in an ecologically sound way. Our institutions of higher education are world-wide leaders in research and development for natural resources management.

Other areas of Nebraska's economy have become strong and diversified. Building on our strengths of people and natural resources, we have created the challenging job opportunities necessary to stem out migration. The larger urban areas of eastern Nebraska are complemented by regional growth centres and vibrant, smaller rural communities. Self-sufficient and self-sustaining Nebraska has become the development centre of the Midwest.

Investments made over 20 years ago in education, infrastructure, and other important areas are paying dividends today. We have one of the finest highway systems in the nation; our education system continues to provide a cornerstone for Nebraska's quality of life; and our outstanding telecommunications system provides access to information and training opportunities throughout the world.

We have established and maintained a high quality of life. Clean air and water, low crime rates coupled with excellent fire and police protection, excellent outdoor

recreation including hunting and fishing reserves, and a strong commitment to the arts make Nebraska an attractive place to live and work. Diverse, organized, and well-promoted tourism programs have boosted the state economic by drawing an increasing number of visitors.

We have improved what was already an excellent education system in Nebraska. The elusive goal of access for all to quality education is being met, and Nebraska has the highest percentage of high school graduates in the nation. With an appreciation for critical thinking and innovation, many of these graduates move on into a strong, coordinated system of higher education.

Nebraska has once again been a pioneer with innovative approaches to learning. Students develop the ability to think and reason. They receive a broad-based and comprehensive education, including science, arts, and the humanities. Our children are encourage to excel without the intense pressure that is applied in some parts of the world. Friendships, ethics, and morality are stressed.

Public policy emphasis has been placed on providing a conducive environment for the nurturing of children and families. A sound system of support services is available for the disadvantaged, and suitable housing can be found for all income levels. The problems of alcohol and substance abuse, so prevalent during the latter part of the 20th century, have been effectively eliminated. Virtually all Nebraskans are able to generate sufficient income to live above the poverty level.

We have been able to maintain an excellent health care system in spite of several factors working against us. With foresight from decades ago, we have been able to prepare and respond to the needs of a growing number of older Nebraskans. Regional economic growth centres have also developed into regional health service centres, providing a wide range of health care services within a reasonable distance from anywhere in the state.

The range of services available for the eldest Nebraskans provides quality care while maintaining dignity. Younger retirees find Nebraska highly suitable for retirement living. The state has built a reputation as an excellent place to spend the "golden years", and Nebraska has taken full advantage of the many benefits that can be gained from its older citizens.

Much of the credit for Nebraska's resurgence should be given to the cooperative attitude between the public and private sectors. Nebraska's citizens take an abiding interest in citizenship, following closely and participating in the process of government at all levels. Public service and participation are recognized as privileges and responsibilities in which we all share.

Our government remains fiscally sound and independent. Tough economic times in the 1980s led to some difficult adjustments, but the current structure meets the needs of Nebraska citizens in a coordinated and cost–effective fashion. The financial needs of the public sector are met through a tax system that is equitable at all levels.

Nebraska has successfully faced up to the challenges of change. Through innovation, persistence, and hard work, we have created an abiding vision for the future and the capacity to take the actions necessary to realize that vision.

"New Horizons is a way for the Legislature to act, not just react." – Senator Don Wesely

"We need the time to seek out expertise and to communicate. Not just talk, but also listen." – Senator Sandra Scofield

"Elected officials can only do those things that the public is willing to understand and accept." – Senator Jerome Warner

"We need to recognize men and women of vision .... we need to recognize those ideas that will stand the test of time." – Senator Howard Lamb"

STATE OF OREGON

Oregon's Commission on Futures Research was established by the state legislature in 1983 to strengthen and improve long-term economic planning and develop policy options for the state. The following Statement of Values appears in Emerging Trends: New Oregon Perspectives for the Year 2010 – Progress Report (1986).

NOTE: Although this statement is not formally titled a vision statement, it serves a similar purpose. So long as the public or its representatives are involved in the visioning process, it is inescapable that any vision or description of a preferred future will reflect the values of the community.

Oregon Statement of Values

"Every choice Oregonians make for the future implies certain values in action. The values we choose to uphold will determine the future we create. As one of the first and most important exercises, the Commission on Futures Research has attempted to articulate the values which we believe best reflect the Oregon experience and most appropriately guide our future. Citizen input is vitally important in articulating these values, and we ask that you respond to the following statements...

Sustained Economic Development

We value a moderate and reasoned approach to economic growth that provides a high standard of living for all Oregonians, greater economic diversity for our communities, and broader opportunities for the creation of new wealth.

Encouragement of Innovation and Creativity

We value the ability to create and innovate, considering the prospect of increasingly rapid change in the future. We seek legislative action and economic policies which carefully nurture innovation to ensure a healthy future economy.

Pride in Our Natural Heritage

We value the tradition of respect for our natural environment and the vigilant safeguarding of our unique heritage for future generations, assuring its continuing availability as a public resource and an essential contributor to Oregon's livability.

Quality of Education for All Citizens

We value quality education, available and affordable for all Oregonians, as our future guarantee of a skilled labour force, an informed populace, a strong economy, and a vital democracy. We see excellence in education as necessary for the discovery of new knowledge and the unleasing of our human potential.

Individual Ruggedness of Energy and Spirit

We value individual freedom, initiative, and spirit as both our birthright and the key to our future. We seek to maximize individual rights, recognizing that they exist in the context of larger social responsibility to our families, communities, and public institutions.

Strong Ethical Leadership

We value honesty, integrity, and responsibility in the conduct of both the public affairs and private enterprise of Oregon. We expect the highest ethical standards of our elected officials, public servants, and business and community leaders."

CITY OF AURORA
(Colorado)

Located adjacent to Denver, Aurora is a city with a 1980 population of 158,588. The following vision statement was approved by the Council and used to develop over fifty strategies related to budgeting, management by objectives and program development.

Aurora's Vision Statement

"Aurora will become the best large city in Colorado and an integral part of the metro area. Through broad participation, the City of Aurora will provide the leadership and direction to develop a high quality community that meets the needs of its citizens. We envision a city that is economically strong, people oriented, environmentally sensitive, visually pleasing and cohesive, with permanence. These attributes will create a positive identity and image for the community. Aurora will be a city of the future that works. It will determine its destiny and set an example for others."

[NOTE: The designation "large city" carries funding and program implications in the areas of services to people for which small cities in Colorado have a lesser responsibility.]

FRONT RANGE COUNTIES OF COLORADO

In 1979, the Governor of Colorado initiated the Colorado Front Range Project to examine how expected growth in the Front Range—the 200 mile long area containing over 80 per cent of the state's population—could be accommodated and the quality of life maintained. The following vision statement appears in the First Year Report of the Project (1980).

A Desired Front Range Future

"Where there is no vision, the people perish."
Vision of the Future: A Future Created by the People, for the People

"Despite the wide differences in the nature of the counties in the Front Range, e.g., between Teller County and Denver County, the information we received suggests there is a common theme that links attitudes in rural and urban areas. We should make decisions cooperatively at the lowest appropriate level of government. That is: more local control with more personal responsibility in the community.

What will human lives be like in a Front Range that stresses personal responsibility for oneself, responsible and responsive government, concern for community and neighbourhood, a highly advanced communications system, and a cared for and nurtured environment? We envision a future that puts people, homes, work, and governments into a framework that is complete yet small in scale compared to the great businesses and government bureaucracies we know today. People live and work in closer proximity.

We aim for 'human scale' in our man-made environment. Such a future challenges the notion of economies of scale — bigger is not necessarily better or more efficient. People control their lives, work and government rather than being controlled. We have a sense of responsibility to others and anticipate the consequences of what we and our communities do. We cooperate and collaborate with one another. We acknowledge that we are interdependent rather than each standing alone. We value quality over quantity and we advocate choice rather than chance. In this desired future, are we seeing the seeds of a sweeping change not only for the Front Range, but for society as a whole? Impossible? Not necessarily so. We think it is possible. Remember, "where there is no vision, the people perish".

Composite View: Five Major Aspects

Our composite view of the future is echoed again and again in five major aspects of the single theme of creating the future 'by the people for the people'.

The Individual. People are looking for opportunities to strengthen family and neighbourhood/community ties, and to live in closely knit communities. We want to be self-reliant and create for ourselves a more meaningful life experience. We urge more pride in work and new work situations to foster such pride. All of us should take more responsibility for our own health. We look for opportunities close to home for life-long education as well as for recreational and cultural activities. We want community involvement at community centres. We want an acceptable quality of life available to all Coloradoans.

The Public Sector. Along with a greater sense of personal responsibility for our own lives, we very strongly expressed a desire for personal involvement in government. Government should be at the level closest to the people which can provide services in the most economical and effective way. We look for an informed electorate by bringing government closer to people and their own communities. We recognize the need for centralized authorities to provide some services, but want to achieve those services with intergovernmental cooperation at the lowest levels of government possible. We want government to be accountable and to encourage public participation in planning.

The Private Sector. We have concern for the creation of a sound economic base and the adaptation of work procedures to the changing times. We should maintain and promote a free market economy encouraging less regulation and more consumer responsibility. A diverse industrial and commercial base combined with the support of a growing cottage industry is important. The ongoing creation of jobs for Coloradoans is imperative. We need to review the context of work as it relates to changing lifestyles and work ethic. A new breed of employee seeks work consistent with personal values and compatible with physical and mental health.

Technology. The 'desired future' of many people contains rapid technological advance which allows for smaller groups of workers and for people to live closer to their work. New communications techniques provide the opportunity for some work to be done at home. This means a return to a kind of 'cabin craft' philosophy coupled with a broad employment base. A range of fast, efficient public transportation along the Front Range should decrease dependence on the automobile and reduce petroleum dependency. Alternative energy sources should be tapped with minimum exploitation of non-renewable resources. Recycling, resource

recovery, and a willingness to make and accept difficult decisions reflecting long-term rather than short-term benefits, should provide opportunities for less waste and more efficient use of energy.

Environment. People believe that attention to the environment is critical, from the need to preserve open space and prime agricultural lands to better utilization of land and water. We want the character of the Front Range to be preserved. We believe that combining the aesthetics of past, present, and future will serve to reinforce community identity. Attention to open space, wildlife habitats, and restoration and improving what we have is essential. Growth should recognize private and public needs. High quality, well designed, affordable, energy efficient housing should become available."

(Adopted September 27, 1980 by participants in the Colorado Front Range Project Conference I, to "guide both government and business as they establish priorities and create a common mind among Colorado's people as they embody its spirit in life and deed.")

The following statement of goals and objectives for a Yukon economic development strategy is extracted from the record of the first public conference held during the Yukon 2000 planning process (Yukon 2000. Yukon Development Strategy: Fall Conference Report. Department of Economic Development. Whitehorse, Yukon: Yukon Government. 1986).

Goals and Objectives:
Agreeing on the Territory's Future Course

"The goals of an economic development strategy, in principle, are no different than the goals held by most individuals in society. Goals represent our ambitions for the future. When people set goals, they usually think about ways of meeting that goal over a period of time by establishing objectives.

For example, a person may make building a new house their goal over the next five years. The steps to meeting that goal might involve finding land, earning the down payment, getting a bank loan, deciding on material and how the house will be built. In short, the final goal comes after measurable objectives have been completed.

A working Yukon Development Strategy will have goals which Yukoners believe they can strive for with confidence. It will also have clear objectives which from time to time can be measured to see if our goals are any closer.

The development strategy goals are not just for government. They are for employers and employees. The goals are also for people who don't work for wages at all. The goals reflect Yukoners priorities for the economic development of the territory.

Proposed goals were discussed in Faro last June at the outset of YUKON 2000. The fall conference provided another chance for Yukoners from many social and economic backgrounds to explore where there is agreement on goals. Delegates also discussed objectives.

In general, people agreed with the goals and objectives presented at the conference. Most of the discussion groups expanded or clarified the intent. Here are the goals as modified by the conference.

The Option to Stay in the Yukon

Yukon should remain a desirable and worthwhile place for people to stay, to live, to learn, to work, and to raise families. Development, first and foremost, should ensure secure and stable opportunities for people to support themselves. The first

priority for development should therefore be directed towards those who have already chosen to make Yukon their home. This goal recognizes for many the option to stay in the Yukon is meaningless unless it allows them to meet their needs in their own communities or have the freedom to move elsewhere in the territory as they wish.

Taking Control of the Future

Yukoners want and intend to have greater control over future development in the territory. Control will never be complete when there are many external events affecting the possibilities for development. But taking control will mean old ways and old relationships with external forces can be explored and constructively changed without isolating the Yukon from the country and the rest of the world.

Greater community control stands as an important dimension of this belief. Higher levels of ownership by Yukoners and greater political and economic autonomy are others.

Achieving an Acceptable Quality of Life

Development should enhance and preserve the quality of life for Yukoners. But what "acceptable quality" means will vary from person to person. An aspect of this goal must be that freedom to make choices for individuals not be lost.

For many, an acceptable quality of life means material well being: wages at least comparable to national standards, a good return on capital invested and time devoted to business; for others it is the knowledge that non-wage lifestyles will survive because renewable resources continue to be accessible to users.

Quality of life has social dimensions. People want and deserve public services and support consistent with national standards. In addition, special circumstances in the Yukon must be accounted for in social programs. In terms of an economic strategy, the provision of services stands as an important productive activity for many.

The special quality of Yukon's environment is a further aspect of quality of life. The land, forests, rivers, lakes, mountains, and wildlife contribute to the life

enjoyed by residents and visitors alike. A complementary link must be made between development requirements and environmental concerns.

Achieving Equality

There is widespread agreement that equality is a valuable goal to include in a territorial development strategy. Poverty exists today in the Yukon. Many people — women, Indians, youth, the elderly, the disabled — do not have the opportunity to participate on equal terms in the economic opportunities available here.

The specific measures which will alter this situation deserve special attention since their integration into the development strategy is complex. The complexity of this issue was highlighted at the fall conferences by delegates who asked questions about what objectives will be undertaken to help meet this goal and how land claims will affect it.

In addition to these four broad goals, the fall conference in all workshops agreed upon the following objectives as part of YUKON 2000.

Increased Job Opportunity

This objective, as delegates pointed out in workshops, is one aspect of an economic development strategy which will allow Yukoners the option to stay in the territory. Specifically, training, greater control over spending, and the encouragement of business will increase the number and variety of jobs.

Diversification of the Economy

Diversification, which itself will improve job opportunities, is cherished as an objective by many in the Yukon. In particular, rural areas see the diversification of the economy as a way of taking advantage of the inherent strengths in rural areas. Diversification, if it is well planned, will also be important to taking control of our own future.

Increased Participation in Decision Making

Quality of life and equality of opportunity are two goals which rely heavily on this objective if progress is to be made towards them. Increased participation, in

delegates minds, means participation in government decision making. Delegates felt this objective would involve giving people the skills and resource to effectively participate. Further, increased participation here is dependent on the Yukon government increasing its power by taking on more responsibilities from Ottawa.

YUKON 2000, as the process continues, will likely reveal other objectives which, in the short term, can help us achieve our long term goals."